



CourtLink® eFile

FILING & SERVICE DETAILS *SETUP*

Filing and Service Details Setup

Use the following guidelines to customize your Filing and Service Details page:

From **User Profile** under Information Desk, select **File/Serve Details**. If you are Court User, then select **Review Options**.

The screenshot displays the LexisNexis CourtLink eFile interface. At the top, the header includes the LexisNexis CourtLink eFile logo, the title 'information desk : user profile', and links for 'Log off' and 'Help'. The user is identified as 'Adam Attorney' from 'Mock Plaintiff Firm'. A navigation bar contains tabs for 'Introduction', 'Personal Information', 'File/Serve Options', 'Notification Options', 'Logon Information', and 'File/Serve Details'. The left sidebar menu includes 'File & Serve' (with a play icon), 'file room', 'myCases', 'Search Filings', 'Build Reports', 'information desk' (with a play icon), 'User Profile' (highlighted with a play icon), 'Firm Profile', 'Case Profile', 'Support', and 'Privacy Statement'. The main content area, titled 'User Profile', lists the following options:

- **Personal Information:** Add or change personal information.
- **File/Serve Options:** Choose additional service recipients and time zone.
- **Notification Options:** Choose options for additional notification of service.
- **Logon Information:** Change user name, password, or password retrieval code.
- **File/Serve Details:** Configure your filing and service details view.

LexisNexis® eFile information desk : user profile **Log off** **Help** **User:** Adam Attorney Mock Plaintiff Firm

TIME: 3:02 PM ET

File & Serve **Options for display on Filing and Service Details.**

file room

myCases

Search Filings

Build Reports

information desk

User Profile

Firm Profile

Case Profile

Support

Privacy Statement

Display All Party information inline instead of in a new window. ☐

Display Case Party information inline instead of in a new window. ☐

Display Filing Party information inline instead of in a new window. ☐

Display Service/Notice list inline instead of in a new window. ☐

Display Additional Recipients list inline instead of in a new window. ☐

Filing ID: ☒

Filed by: ☒ **Authorized by:** ☒

Filing Option: ☒ **Authorized Date:** ☒

Court: ☒

Division/Courtroom: ☒

Case Class: ☒ **Case Type:** ☒

Case Number: ☒ **Case Name:** ☒

Judge: ☒ **Alternate Judge:** ☒

Click the checkbox to display documents in a lower frame inline instead of in a new window. ☐

☐ **View Sample Filing and Service Details page** **Save**

The setup menu above shows all available configurations for your details pages.

1. Select Detailed Party Information

Select any party details you wish to view on the details page by placing a check mark next to each selection desired.

- Display all Party information inline instead of in a new window
- Display all Case Party information inline instead of in a new window
- Display all Filing Party information inline instead of in a new window
- Display all Service/Notice lists inline instead of in a new window
- Display all Additional Recipients inline instead of in a new window

2. Select Detailed Filing Information

Filing details fields can be added/removed from your personal view as desired. Select the fields you want to have displayed when you view details pages.

Available fields:

Filing ID: Unique identifier assigned to each CourtLink eFile transaction

Filed By: The name of the person that submitted the transaction

Filing Option: File and Serve; Serve Only – Public; Serve Only – Private; or File Only

Court: *The Court where the case is assigned*

Division/Courtroom: *The courtroom where the case is assigned (if applicable)*

Case Class: *The class of case (Civil, Domestic Relations, Probate, Water, etc)*

Case Type: *The case type assigned to the case (Personal Injury, Child Custody, etc)*

Case Name: *The abbreviated case name assigned by the court or the original filer*

Case Number: *The court-assigned case number*

Judge: *The name of the judge assigned to the case (if applicable)*

Alternate Judge: *An alternate judge assignment (if applicable)*

Authorized By: *The name of the attorney authorizing the transaction*

Authorized Date: *The date and time the transaction was submitted to CourtLink eFile.*

3. Select Whether to View the Documents Automatically or on Demand

Click the checkbox to display documents in the lower frame inline instead of a new window

4. **If you are a Court User, you can opt to have your Clerk Review and Judge Review screens refresh after you have submitted a transaction.** Refreshing will remove items that are completed from your list of items to be reviewed automatically. If you opt *not* to refresh, then items will stay listed in your list of items to review until you exit the myCases work area. Refreshing is not recommended if you are not on a high-speed connection to the Internet.

5. Click to Preview the Customized Details Page for Accuracy

Sample 1: Automatic Document Viewing Turned OFF (default view for all users)

Filing and Service Details		<<Previous Filing		Next Filing>>	
Case Parties	Filing Parties	Service/Notice List	Additional Recipients	View All	
Filing ID: 10001 Authorized by: Authorizing, Attorney Authorized Date: 11/29/2002 3:23:57 PM ET Court: Mock eFiling Court Case Type: Mock Case Number: 2002M1234 Case Name: Mock Case 1234 Judge: Judge, Primary					
Edit information and/or change the review status for each document, or click Accept All to accept all documents in the filing. Select reasons and enter comments for any edits or rejections. Then click Submit .					
Document List Accept All		Total Filing Fees: \$0:00			
ID: 1234567 - Main Document - 10 Page(s) - Linked Documents Filing Type: This is the Filing Type that is Available Filing Fee: \$0.00 Access: Public Status: Pending Document History		Title: Open Document in new window This is the title of Document 1234567			
ID: 1234568 - Related to 1234567 - 10 Page(s) - Linked Documents Filing Type: This is the Filing Type that is Available Filing Fee: \$0.00 Access: Public Status: Pending Document History		Title: Open Document in new window This is the title of Document 1234568			
ID: 1234569 - Related to 1234567 - 10 Page(s) - Linked Documents Filing Type: This is the Filing Type that is Available Filing Fee: \$0.00 Access: Public Status: Pending Document History		Title: Open Document in new window This is the title of Document 1234569			

PDF copies of documents can be opened in a new window by clicking hyperlink

In this view, each document in a transaction is listed separately. To view a document, click the **Open Document in new window** hyperlink. The *Original Format* of the document can be accessed by clicking the **Original Format** link (not shown) or, for Reviewing Clerks, by clicking the **View All** link at the top of the page.

Additional information such as financial receipt information and filing information from a clerk may be available in the details if a court has opted to show these details.

Sample 2: With Automatic Document Viewing Turned ON

Filing and Service Details <<Previous Filing Next Filing>>

Case Parties	Filing Parties	Service/Notice List	Additional Recipients	View All
Filing ID: 10001 Authorized by: Authorizing, Attorney Authorized Date: 11/29/2002 3:23:21 PM ET Court: Mock eFiling Court Case Type: Mock Case Number: 2002M1234 Case Name: Mock Case 1234 Judge: Judge, Primary				

Document Tree Close

- Filing Type Document Title
 - This is The Filing This is the title of Document... [open](#)
 - This is The Filing... This is the title of Document... [open](#)
 - This is The Filing... This is the title of Document... [open](#)
 - This is The Filing... This is the title of Document... [open](#)

<<Prev Document 1234567 Next>>

Main Document - 10 Page(s) - [Linked Documents](#)

Title: [Open Document in new window](#)

Document Title Here

Filing Type: This is the Filing Type that is Available

Filing Fee: \$0.00

Access: Public

Status: Pending

[Document History](#)

Actual Document Displayed Here

To view additional documents in this transaction, click the **Next** or **Prev** links in the documents section on the lower left frame.

Note: Automatic viewing of a document may create a delay when opening a details window because Adobe will automatically execute to display the documents.

- Click **Close** to return to the setup screen.
- When you have complete your setup requirements, deselect **View Sample** and click **Save**.
- A confirmation window will appear indicating that your changes are complete.